

**REQUEST FOR PROPOSALS
FOR REVALUATION SERVICES
TOWN OF APPLETON, MAINE**

The Town of Appleton, Maine seeks proposals from qualified Contractors to revalue all real and personal property in the Town, effective April 1, 2005. Contractors interested in providing the revaluation services are invited to submit a copy of their proposal to the Board of Selectmen of the Town of Appleton no later than 7:00 PM, October 19, 2004. Proposals will be opened and read at the Selectmen's meeting on that date. For specifications and a proposal form, contact the Appleton Town Office during normal office hours; write to the Town of Appleton at 2915 Sennebec Road, Appleton, ME 04862; call (207) 785-4722; or download from www.appleton.me.gov.

**PROPOSAL
FOR REVALUATION SERVICES
TOWN OF APPLETON, MAINE**

All proposals shall be addressed to: The Board of Selectmen, Town of Appleton, 2915 Sennebec Road, Appleton, Maine 04862. All bids shall be in writing and placed within a sealed envelope marked "Town of Appleton, Proposal for Revaluation Services Bid, not to be opened until October 19, 2004," and mailed or delivered to the Town Office.

All information pertaining to the Contractor's technical and managerial approach to completing this project, as well as the proposed price and timetable, shall be presented in the proposal. The proposal must address, at a minimum, each of the issues set forth in the Request for Proposal in order to be considered responsive.

The Town of Appleton reserves the right to amend this request for proposals for revaluation services, and the other services described, at any time prior to the deadline for submission for proposals and to reject any or all proposals received if it determines it to be in its best interest to do so.

The Town is licensed to utilize the State of Maine Prop Card, CAMA software system. The system shall be loaded with all assessment data before the revaluation is completed. Conversion from the present system is solely the Contractor's responsibility. All data entry from the Prop Card CAMA system into the Trio Software collections system shall be the responsibility of the Contractor. The Contractor shall propose a solution to complete the project without unduly impacting the day-to-day operations of the Town Office or Assessing Department.

In addition to addressing each item in the specifications, the Contractor must submit, as part of its proposal, the following information:

1. A Letter of Transmittal signed by the individual authorized to negotiate for and contractually bind the Contractor. (The offer and acceptance is subject to the required funding being approved by the Town.
2. Reference Lists.

3. Resume(s), of key personnel responsible for the project.
4. A List of revaluation contracts for which the Contractor is currently committed.
5. Description of the Contractor's public relations program that would be used during the revaluation process.

SUMMARY

Service	Total Price
Revaluation of all real property	\$ _____
Revaluation of all personal property	\$ _____

The above prices are to be considered separate, unbundled amounts. The Town of Appleton reserves the right to select or reject any or all prices, whichever arrangement it believes best serves its interests. The revaluation of real and personal property is to include, data, loaded and operational in the Town's computer. Bids shall include the following information.

1. Name and telephone number of person (s) to be contacted for further information or clarification.
2. Reference List.
3. Name of project supervisor to be assigned to this project, along with his/her resume.
4. Time schedule filled out according to Contract Specifications.
5. Staged fee payments filled out according to the Contract Specifications.
6. Rate per parcel for each property in excess of the current number identified in Contract Specifications.

CONTRACT SPECIFICATIONS

SCOPE OF THE REVALUATION PROJECT

- A. The revaluation PROJECT requires the complete revaluation of all taxable real and personal property, and all tax-exempt real property located within the corporate limits of the Town of Appleton, Maine.
- B. Contractor shall furnish all labor, materials, supplies and equipment, and shall perform all work for the project in strict conformity with these contract specifications.

C. The scope of the PROJECT shall be subject to the approval of the Town. The Town Assessors (the Town's Board of Selectmen) shall have final approval of personnel, forms, records and materials utilized in this PROJECT. The PROJECT shall conform to the Standards and Qualifications defined in Rules of the Maine Revenue Service.

D. The values to be determined shall be just value (market value) as these terms are defined in Maine Statutes and Maine Supreme Court decisions. Basis of valuation shall be the recognized methods of appraising real and personal property, as defined by the Appraisal Institute and the International Association of Assessing Officers (IAAO), and as set forth in the Uniform Standards of Professional Appraisal Practice promulgated by the Appraisal Standards Board of the Appraisal Foundation.

E. The PROJECT shall include the valuation of the following categories of property within the Town:

1. All taxable real property, including land, buildings and all other types and classes of land improvements.
2. All tax-exempt property. Decisions regarding the exempt status of such property shall be made by the Town.
3. All taxable personal property as specified by the Town.

F. The effective date of this revaluation PROJECT shall be April 1, 2005.

G. The approximate number of land parcels and personal property accounts as of April 1, 2004 is as follows:

Taxable and Tax-Exempt parcels: 800 Improved, 400 Vacant (1200 Total parcels)

Total personal property accounts: 50

H. Pertinent Town Data:

1. Last completed Land and Building revaluation was in 1986, and a Land revaluation was completed in 2001.
2. Estimated Population as of the most recent census is 1271.
3. The total area within the Town's corporate boundaries is 33.5 square miles more or less. Approximately 32.8 square miles of this is land with .8 square miles of water. The total area is approximately 2.30% water consisting primarily of Sennebec Pond and the St George River Watershed.
4. Estimated number of building permits per year 65, including 10 new dwellings, more or less.

[Note: permit numbers are the average of the three prior years, 2001-2003.]

GENERAL CONDITIONS

A. **PROJECT AWARD.** The Town of Appleton, Maine reserves the right to reject any part of, or all of each bid proposal; to waive informalities and technicalities; and, to accept that proposal or portion of a proposal which the Town in its sole, exclusive judgment deems to be in its best interest. Proposal price shall be a consideration, but lowest price shall not be the sole criterion on which the award shall be based. Consideration shall also be given to the background and experience of the Contractor, the training and experience of its personnel, and its record of achievement.

B. COMPANY

1. **CERTIFICATION.** Each prospective Contractor must hold, a written certification by the Maine Department of Revenue Services from the time of the submission of the proposal issued through the satisfactory completion of all work required herein.

2. **Proposal.** Each Proposal submitted shall itemize the prospective Contractor's qualifications and experience. The Contractor shall submit a list of references.

C. **PERSONNEL** Contractor shall provide experienced and qualified personnel employed by it in accordance with the Equal Employment Opportunity provisions of federal and state governments. Contractor shall submit to the Town written qualifications of all personnel assigned to this project in the form of a detailed, written resume. All personnel assigned to this project shall be subject to the approval of the Town and shall be removed from this project by the Contractor upon written request of the Town.

1. **Office Space, Hours and Staffing.** The Town shall furnish to the Contractor with sufficient office space, necessary office furniture, access to telephones and copier equipment to carry out the terms of this contract. Contractor shall be responsible for all associated telephone and copier charges and expenses. Contractor shall notify the Town of the names of Contractor's representatives, supervisor and staff that will be working on the project.

2. **Minimum Qualifications.** The Contractor shall employ qualified personnel to perform the work required in this project. Personnel shall, at a minimum, possess the minimum qualifications and professional designations established by the Maine Revenue Service, i.e., Certified Maine Assessor (CMA).

3. **Identification.** All Contractor Personnel shall carry suitable I.D. cards, which will include an up-to-date photograph.

4. **Conflict of Interest.** No resident or Town employee shall be employed by the Contractor on this project without express written consent of the Town of Appleton Selectmen.

D. PROTECTION OF THE TOWN

1. **Indemnification and insurance**

1.1 The Contractor agrees to defend and indemnify the Town against claims for bodily injury, accidental death, and property damage, which may arise in the course of the Contractor's performance of

the contract, and, in all other respects, to hold the Town harmless from both inadvertent and negligent acts of the Contractor, its employees, and agents.

1.2 The Contractor shall not be responsible for consequential or compensatory damages arising from the late performance or non-performance of the contract caused by special or unusual circumstances beyond its reasonable control, such as acts of God or force majeure.

1.3 The Contractor shall maintain automobile liability insurance and workmen's compensation insurance for personnel.

2. Failure of the Contractor to complete all work prior to September 1, 2005 shall be cause for a payment by the Contractor to the Town of One Hundred Dollars (\$ 100.00) per calendar day from that date until satisfactory completion of all work. For the purpose of identifying such payments as liquidated damages only, completion of all work is defined to include:

- a. Completed data collection cards with all measurements and listings.
- b. Completed review documents.
- c. Completed hearings and hearing corrections.
- d. Completed sales ratio analyses.
- e. Completed final valuations and total work product tested, reviewed and delivered.
- E CAMA data loaded and fully operational.
- g. Cards printed and delivered to the Town office.

Liquidated damages, if applied, shall be deducted from the contract price to the extent there is sufficient undisbursed funds remaining in the contract, exclusive of the retainage, otherwise they will be paid by the Contractor from other sources. Delays occasioned by acts of God, order of court of competent jurisdiction, or force majeure are exempted.

E. COMPLETION DATE AND TIME SCHEDULE

1. Changes and subletting of contract.

1.1 Revisions, Modifications and Subletting, The Contractor shall not change, modify, assign, transfer, delegate or sublet the Contract, or any interest or part thereof without first receiving written approval from the Town and Maine Revenue Services. It shall be mutually agreed and understood that consent by the Town shall not release the Contractor from any contractual responsibility or liability.

2. Time Schedule.

2.1 Revaluation work shall start in the town no later than thirty (30) days after signing the contract.

2.2 All corrected and finalized appraisal cards shall be completed and turned over to the Town no later than September 1, 2005 at which time CAMA data shall be fully loaded, tested and operational on the Town's computer system.

2.3 Assessment Date. The completed appraisals, upon approval of the Selectmen/Assessors, will be the basis for the municipal property Assessment effective April 1, 2005. All data contained on the appraisal cards, and the software package shall reflect an assessment date of April 1, 2005.

F. PAYMENT SCHEDULE. Payment schedules will be delineated within Bid Proposal and contract. Ten percent (10%) of the total contract price will be withheld until such time as the Selectmen/Assessors determines that the Contractor has fully and satisfactorily completed all of its obligations and requirements under the contract.